

TSPC Quarterly Report **August 18, 2008**

The Technical Services Planning Committee met in conference calls on June 19, July 17, and August 7, 2008. This report is based on the discussions and recommendations at those meetings and on subsequent email interactions.

1. Committee leadership for 2009

The TSPC has elected the following members to serve as committee and subcommittee officers for 2009:

TSPC

Chair: Sue Wartzok (FIU)
Vice-chair/chair-elect: Cecilia Botero (UF-HSC)

Authorities Subcommittee

Co-chairs (continuing): Priscilla Williams (UF), Elaine Winske (FIU)

Metadata Subcommittee

Chair: Naomi Young (UF)
Vice-chair/chair-elect: No one has volunteered; a name will be submitted at a later date.

Action item: The TSPC requests approval of the TSPC leadership for 2009.

2. TSPC priorities for FCLA

In response to a request from CSUL in July, the TSPC affirms that its priorities for FCLA continue to be the items included in the TSPC action plan for 2008, as may be modified by subsequent CSUL action requests.

3. Single bibliographic record report

Attached herewith is the TSPC report on issues and opportunities involved in moving to a single bibliographic record architecture to replace the individual local instances that the SULs have maintained till now. This report was prepared by a special task force whose work has been the major focus of TSPC effort since June. Members were Cecilia Botero (UF-HSC), Jeff Bowen (UNF), Susan Heron (USF), Amy Weiss (FSU), and Jean Phillips (FCLA).

The report includes three parts: (1) a narrative outline report; (2) a spreadsheet showing costs and staff efforts for specific necessary tasks or projects for the SULs and FCLA; and (3) a report by Michele Newberry giving FCLA's responses to a number of questions posed by the task force. The narrative presents four options for bib record sharing which are used by large shared systems across North America (of which the first is probably the model the SUS would select if a decision is made) plus a lengthy list of points pro and con, important considerations, costs both financial and for staff time, decisions to be made before proceeding, and issues requiring further discussion and exploration. That this entire process would be immensely complex, requiring enormous amounts of planning for and staff-intensive effort both before and

after migration, is already well understood. FCLA estimates a minimum of 18-24 months in planning and database preparation and cleanup projects before migration, and recommends not starting their own work until after the upgrade to Aleph v. 19, assuming that decision rather than waiting for v.20 (summer 2009), with actual migration not starting at least for two years after that (summer 2011).

Many thanks to the task force and to Michele Newberry for their hard work in preparing the report.

4. Indexing review

Another high-priority action plan item is the indexing review project: to review the Aleph index structures after four years of Aleph experience and also to delete indexes which are little used and/or consume excessive computer resources. The Authorities Subcommittee and TSPC proper both approved lists of changes prepared by Mary Ann O'Daniel (FCLA) by June 30, which are currently being tested on the DEV18 server. Proposed changes to word indexes will be reviewed and tested next. The project of then re-indexing all 11 local instances would begin about October 21 and final completion, allowing for delays, by March 31, 2009.

5. Other TSPC action plan items

Considerable progress on the rest of our action plan items continued to be achieved during this quarter. The following reports on further accomplishments to date:

1.1 Improve access to information via Mango/Endeca: Following installation of a faster server and development of new programming and streamlined procedures, FCLA is in the last stages of testing full Aleph bibliographic and data updates into Mango/Endeca with only a 24-hour latency. This has been a long-desired goal among the SULs and is probably the fastest practicable updating schedule possible given the nature of Endeca. Since January FCLA has been able to move from 4-day latency to updates 5 days a week with a 35 hour latency, to testing 24-hour updating..

After discussion with the OPAC Subcommittee it was agreed that writing a full report on the recommendations from the OPAC Visioning Summit in January is no longer needed, as the OPAC group has been working on the recommendations from the highlights report and on other changes as well. The rapid pace of such work has outstripped the need to write a full report on the Summit.

1.2 Shared bibliographic record file model: The task force's report was completed and approved by TSPC, and is attached herewith (see # 3 above).

USF's implementation of WorldCat Local, which represents a different OPAC model, went live on August 4.

1.3 Centralized Marcive full dataload for e-government document records: . The TSPC previously approved a possible model developed by FCLA, and this item is currently being pursued by the PSPC. At the present time FCLA is waiting for a cost proposal from Marcive which will be shared with the TSPC and PSPC.

1.4 Improve GenLoad loading of bibliographic record files into Aleph: In April the TSPC decided on the enhancements to be included in the latest upgrade by

FCLA, which are still being tested. FCLA is also field testing GenLoad v. 2.1.5 with various SULs.

1.5 Improve access to digital materials in Mango/Endeca: The Metadata Subcommittee is actively working on its own initiatives and has also sent a letter to the TAG DISC Subcommittee identifying four possible topics for collaboration. DISC has enthusiastically responded. See the separate Metadata quarterly report for details.

3.1 Improve reporting functionalities in Aleph: FCLA continues to work on reconfiguring the Aleph data in the Data Warehouse into a more standard format so it can be better used for report writing with SQL, pending moving to a more flexible report writing tool. They are also looking at CCLA-developed Aleph reports to see if any code can be borrowed/adapted for SUS use. FCLA also continues to investigate BIRT (Business Intelligence and Reporting Tools), an Eclipse-based open source reporting system for web applications, as a better option for generating reports beyond what is provided within Aleph.

3.2 Data cleanup activities in the local SUL catalog databases: Needed projects are being identified and posted on the TSPC swiki.

3.3 Improve authority control through automatic updating of authority headings: Work on this item will begin after the indexing review in 3.4 below has been completed and our local indexes have been regenerated.

3.4 Improve indexing in Aleph: In progress, with re-indexing of our local Aleph instances to be completed by March 31, 2009. See #4 above for a more complete report.

3.5 Metadata Subcommittee will establish a working relationship with the TAG DISC Subcommittee: See also # 1.5 in this listing and the separate Metadata quarterly report. In progress and active collaboration between the two groups is functional.

4.1 Participate in planning for a remote statewide storage facility: The CPC task force coordinating this activity did not contact the TSPC until August, asking for TSPC feedback on several of the 19 recommendations they had developed which pertain to TSPC issues. Because of an email communication glitch this request came too late for the TSPC to respond to in time for this quarterly report, but there will certainly be more to report on for the next one.

6. Authorities Subcommittee

The Authorities Subcommittee is submitting a separate report.

7. Metadata Subcommittee

The Metadata Subcommittee is submitting a separate report.

8. Committees-CSUL leadership summit

As a result of emails among the PSPC, TSPC, and CPC chairs during the summer, the committees are requesting an opportunity for the current and incoming chairs and vice-chairs to meet with CSUL, as part of their September or December 2008 meetings, to discuss coordinating communication, expectations, and setting priorities among all the committees, including TAG, and with CSUL and FCLA. To our

knowledge such a meeting has never been held but it is needed. We understand that the CPC is requesting this meeting in their own quarterly report.

Action item: The TSPC requests approval of a committee leadership summit with CSUL.

Respectfully submitted,
Dan North (UWF), Chair